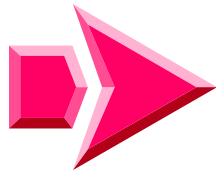


Screener Training 101

Archiving

Screeners Training 101

- Basics
- Security/Screen Transfers
- Archiving
- MCI – Master Customer Index
- Auto Transfer to CARES
- Help



Archiving

- Why archive screens?
 - Reports only list the most current screen
 - Are you using reports for operations
 - Clients may move, disappear, die

Archiving

- Basically, archiving allows agencies to 'clean-up' their reports, if you're using reports for operational management.
- If you're not using reports for operations, you may not want to be bothered with archiving screens.

Archiving

- Archiving works hand-in-hand with screen archive status
- Screen archive status:
 - Active
 - Archived

Archiving

Screen Summary Report: Criteria - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Print Mail Edit

Address <http://acc.dwd.wisconsin.gov/deslct/LTCA/Reports/LTCRptStatSumCriteria.asp?ProgID=CHD> Go Links

Functional Screen Information Access Sign-off

DHFS Home New Search Reports FAQ Admin Help

Screen Summary Report: Criteria

Select County to filter Assigned to Agency dropdown (optional):

County: All

Select desired screen criteria:

Assigned To Agency: All

Screener: Eichima1, Marie

Status: All

Screen Archive Status: All

Select screen completion date desired:

From: (mm/dd/yyyy)

To: (mm/dd/yyyy)

All
Active
Archived

Archiving

- How to archive screens?

The screenshot shows a web application titled "Functional Screen Information Access". At the top right is a "Sign-off" button. Below the title bar is a navigation menu with links: Home, New, Search, Reports, FAQ, Admin, and Help. On the left side, there is a "Utilities" section with links for "Transfer" and "Screen Status". The main content area displays the name "jackson, jenna" and a section titled "Applicant Screen Information". This section contains three tabs: "Children's LTS Screen *" (which is selected), "Adult LTC Screen Personal Care Screen", and "Adult MH/AODA Screen". Under the selected tab, the text "Children's Long Term Support" is displayed. Below this, it says "Assigned To: test agency childrens" and "Screener Name: Eichima1, Marie". A prompt "Create a new screen for Children's Long Term Supports:" is followed by a field for "*Screen Begin Date:" with a date input box and the format "(mm/dd/yyyy)". At the bottom, there are three buttons: "Initial Screen", "Annual Rescreen", and "Change in Condition".

Functional Screen Information Access

Sign-off

Home New Search Reports FAQ Admin Help

Utilities
Transfer
Screen Status

jackson, jenna

Applicant Screen Information

Children's LTS Screen * Adult LTC Screen Personal Care Screen Adult MH/AODA Screen

Children's Long Term Support

Assigned To: test agency childrens
Screener Name: Eichima1, Marie

Create a new screen for Children's Long Term Supports:

*Screen Begin Date: (mm/dd/yyyy)

Initial Screen Annual Rescreen Change in Condition

Archiving

- Screener can update screen archive status
- System can automatically update archive status, from archived to active
- Automation system changes:
 - Transfer a screen
 - Any update to screen
 - Calculation eligibility

Archiving

- Contacts
 - SOS Help Desk
 - Hours: 9:00 – 11:30 AM
12:30 - 2:30 PM
(you may leave voice mail at other times
and someone will return your call)
- E-mail: soshelp@dhfs.state.wi.us
- Phone: (608) 266-9198
- Fax: (608) 267-2437

Archiving

- Demo